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TvBasics 23

THE TELEVISION BUREAU OF ADVERTISING'S REPORT ON THE SCOPE AND DIMENSIONS OF TELEVISION TODAY

TV HOMES CLIMB TO 76.3 MILLION

Number of TV Homes	76.3 Million
Number of Color TV Homes	63.4 Million (83% of TV Homes)
Number of Multi-Set Homes	38.3 Million (50% of TV Homes)
Time spent with TV per home per day	6 Hrs. 28 Mins.
Total time spent with TV per day	482 Million Hours

Source: A.C. Nielsen: TV Homes, Jan.1980; time spent, 1979 annual average

TV Homes; Time Spent

TV SET OWNERSHIP AT 98%... AND VIEWING IS HEAVY

		% TV Penetration	Avg. Viewing Time per TV Home per day	% Color Penetration of TV Homes
TOTAL U.S.		98	6:57	81
BY HOUSEHOLD INCOME	Under $10,000	96	6:35	67
	$10,000—$14,999	99	6:38	78
	$15,000 and Over	99	7:15	91
	$20,000 and Over	99	7:10	92
BY AGE OF LADY OF HOUSE	18-34	98	7:06	80
	35-54	99	8:04	84
	55 and Over	98	6:27	83
BY HOUSEHOLD SIZE	1-2 persons	97	5:42	76
	3-4 persons	99	7:57	87
	5 or more	99	9:14	86
BY EDUCATION OF HEAD OF HOUSE	0-8 Yrs. G.S.	97	7:12	70
	1-3 Yrs. H.S.	98	7:28	73
	4 Yrs. H.S.	98	7:03	86
	1 + Yrs. College	98	6:28	83
BY TERRITORY	Northeast	98	6:46	78
	East Central	98	7:10	84
	West Central	98	6:47	81
	South	98	7:15	79
	Pacific	97	6:37	88
BY COUNTY SIZE	A	98	7:00	80
	B	98	6:55	81
	C & D	98	6:53	83

Source: A.C. Nielsen: % TV Jan. 1980, Color Penetration, Mar. 1979, Time Spent, Nov. 1979

TV Penetration & Time Spent By Market Characteristics

GROWTH OF COMMERCIAL TELEVISION STATIONS

TV Stations	1955	1960	1965	1970	1975	1980
Total	411	515	569	677	706	734
VHF	297	440	481	501	514	516
UHF	114	75	88	176	192	218

Source: Television Digest, Jan. of each year

TV Stations

TV VIEWING NOW 6 HOURS 28 MINUTES PER DAY

	Daily TV Viewing Per TV Home
1950	4 hours 35 min.
1955	4 hours 51 min.
1960	5 hours 6 min.
1965	5 hours 29 min.
1970	5 hours 56 min.
1975	6 hours 7 min.
1979	6 hours 28 min.

Source: A.C. Nielsen, annual averages

TV Viewing

TV ATTRACTS THOUSANDS OF ADVERTISERS AND BRANDS

	Network TV	Spot TV
Advertisers	574	2,627
Brands	2,491	10,854

Source: BAR, 1979

Advertisers & Brands

SUMMER VIEWING INCREASES... AND VIEWING LEVELS ARE HIGH

	Daily TV Viewing per TV Home	% Homes Using TV During Avg. Minute—1979		
			Summer June-Aug.	9 "other" months
1955	3 hrs. 58 mins.			
1960	4 hrs. 10 mins.	Daytime M-F		
1965	4 hrs. 36 mins.	10 am-4:30 pm	26%	27%
1970	5 hrs. 5 mins.			
1975	5 hrs. 20 mins.	Late Night M-S		
1979	5 hrs. 50 mins.	11 pm-1 am	28%	27%

Source: A.C. Nielsen

Summer Viewing

TELEVISION REACHES PEOPLE

In an Average Day	In an Average Week		Daily Hours of Viewing
88%	95%	of all TV households	6:57
73%	89%	of all men	3:55
78%	91%	of all women	4:45
68%	90%	of all teens 12-17	3:25
83%	95%	of all children 2-11	3:43

Source: A.C. Nielsen. Reach—Feb. '77, Viewing—Nov. '79

TV Reaches People

DISTRIBUTION OF TOTAL TIME SPENT DAILY WITH MEDIA BY ADULTS

	All Adults	In $20,000 + Income Homes	Better Educated
Television	53%	49%	45%
Radio	32%	34%	36%
Newspapers	9%	11%	11%
Magazines	6%	6%	8%

Source: TvB/R.H. Bruskin, Jan. 1980

Time Spent with Media

ADVERTISING AGENCIES... THE TOP 10 TV USERS IN 1979

	Millions of Dollars			TV's Share of Total Billings
	TV Network	TV Spot	Total TV	
1. Young & Rubicam	$448.0	$187.0	$635.0	56%
2. J. Walter Thompson	381.1	198.8	579.9	64%
3. Leo Burnett	275.0	82.0	357.0	56%
4. BBDO	221.0	107.0	328.0	55%
5. Dancer Fitzgerald Sample	177.2	109.2	286.4	68%
6. Grey	186.1	98.1	284.2	58%
7. Ogilvy & Mather	177.1	106.6	283.7	54%
8. D'Arcy-MacManus & Masius	140.2	106.7	246.9	68%
9. McCann-Erickson	161.8	76.2	238.0	54%
10. Doyle Dane Bernbach	162.0	75.0	237.0	51%

Source: Broadcasting Magazine

Top TV Ad Agencies

LEADING LOCAL TV CATEGORIES

	Add (000)		
	1978	1979	% Change
1. Restaurants & Drive-Ins	$261,066.7	$310,498.1	+ 19
2. Banks, Savings & Loans	148,650.8	166,304.5	+ 12
3. Food Stores & Supermarkets	140,336.3	159,002.2	+ 13
4. Auto Dealers*	133,310.2	145,345.7	+ 9
5. Department Stores	149,651.5	140,364.2	− 6**
6. Furniture Stores	95,035.2	122,465.4	+ 29
7. Movies	85,873.9	111,287.4	+ 30
8. Discount Department Stores	74,071.8	81,410.7	+ 10
9. Amusements & Entertainment	55,376.3	68,260.3	+ 23
10. Radio Stations	42,087.6	64,423.9	+ 53

Source: BAR
*Dealer Associations Not Included
**A change in 1979 in assigning product commercials with single store tags resulted in dollars shifting to Spot TV categories

Leading Local Categories

LENGTH OF ANNOUNCEMENTS—THE 30 SECOND DOMINATES

	Non-Newtwork				Network			
Announcement Length	1965	1970	1975	1979	1965	1970	1975	1979
10 seconds	15%	11%	8%	8%	—%	—%	—%	1%
20 seconds	13	3	—	—	—	—	—	—
30 seconds	1	54	83	87	—	32	83	83
60's piggybacked	7	9	1	—	25	45	12	13
60 seconds	64	23	8	5	75	23	5	3
	100%	100%	100%	100%	100%	100%	100%	100%

Source: BAR, Nov. of each year

Commercial Length

CATV OPERATING SYSTEMS AND SUBSCRIBERS

	1960	1965	1970	1975	1980
Operating Systems	640	1,325	2,490	3,366	4,048
Subscribers	650,000	1,275,000	4,500,000	9,800,000	15,500,000
% of TV Homes	1.4%	2.4%	7.6%	14.3%	20.5%

Source: Television Digest, Jan. 1 of each year

CATV

TOTAL ADVERTISING VOLUME REACHES $49.8 BILLION: MAJOR MEDIA: $33.2 BILLION

	Millions of Dollars			
	1978	1979	% Change	% of Total
Total Advertising	$43,970	$49,830	+13.3	100.0
TELEVISION	8,979	10,195	+13.5	20.5
Newspapers	12,707	14,585	+14.8	29.3
Magazines	2,597	2,930	+12.8	5.9
Radio	3,052	3,385	+10.9	6.8
Outdoor	466	535	+14.8	1.1
Business Papers	1,400	1,595	+13.9	3.2
All Others	14,769	16,605	+12.4	33.2

Source: McCann-Erickson 1/80

Total Ad Volume

NATIONAL ADVERTISING INVESTMENTS IN MAJOR MEDIA $15.2 BILLION

	Millions of Dollars			
	1978	1979	% Change	% of Total
TELEVISION	$6,356	$7,430	+13.3	48.7
Network	3,375	4,540	+14.2	29.8
Spot	2,581	2,890	+12.0	18.9
Newspapers	1,787	2,085	+16.7	13.7
Magazines	2,597	2,930	+12.8	19.2
Radio (Network & Spot)	767	850	+10.8	5.6
Outdoor	307	350	+14.0	2.3
Business Papers	1,400	1,595	+13.9	10.5
Total Major Media	$13,414	$15,240	+13.6	100.0

Source: McCann-Erickson 1/80

National Ad Volume

LOCAL ADVERTISING INVESTMENTS IN MAJOR MEDIA REACH $18.0 BILLION

	Millions of Dollars			
	1978	1979	% Change	% of Total
TELEVISION	$2,423	$2,765	+14.1	15.4
Newspapers	10,920	12,500	+14.5	69.5
Retail	6,994	7,860	+12.4	43.7
Classified	3,926	4,640	+18.2	25.8
Radio	2,285	2,535	+10.9	14.1
Outdoor	159	185	+16.4	1.0
Total	$15,787	$17,985	+13.9	100.0

Source: McCann-Erickson, NAB 1/80

Local Ad Volume

COLOR TV PENETRATION TOPS 83%... 63.3 MILLION TV HOMES HAVE COLOR

	Color Households	Penetration of TV Households
1960	340,000	0.7%
1965	2,810,000	4.9
1970	23,400,000	39.2
1975	48,500,000	70.8
1980	63,350,000	83.0

Source: NBC 1960-75 A.C. Nielsen, 1980

Color Television Growth

TELEVISION SET SALES TOP 16 MILLION IN 1979

	Total	Color	Monochrome
1974	15,279,000	8,411,000	6,868,000
1975	10,637,000	6,219,000	4,418,000
1976	14,131,000	8,194,000	5,937,000
1977	15,431,000	9,341,000	6,090,000
1978	17,406,000	10,674,000	6,732,000
1979	16,619,000	10,043,000	6,576,000

Source: EIA Domestic & Imports

TV Set Sales

TV VOTED MOST AUTHORITATIVE

Which medium/advertising is the most authoritative:	% of Adults 18 Yrs. + The Medium	The Advertising
Television	50%	50%
Newspapers	29	26
Magazines	8	9
Radio	7	5

Source: TvB/R. H. Bruskin, June 1975

Most Authoritative

TV VOTED MOST BELIEVABLE

	% of Adults Responding					
	1959	1964	1968	1972	1976	1978
Television	29%	41%	44%	48%	51%	47%
Newspapers	32	23	21	21	22	23
Radio	12	8	8	8	7	9
Magazines	10	10	11	10	9	9
Don't know	17	18	16	13	11	12

Source: TIO/Roper

Most Believable

TV VOTED SOURCE OF MOST NEWS

	% of Acults Responding					
	1959	1964	1968	1972	1976	1978
Television	51%	58%	59%	64%	64%	67%
Newspapers	57	56	49	50	49	49
Radio	34	26	25	21	19	20
Magazines	8	8	7	6	7	5

Source: TIO/Roper

Source of News